START GUIDE
CDMNEXT

## TABLE OF CONTENTS

1. PRODUCT OVERVIEW

CDMNext offers a transformed web-based platform from a generic data extraction tool allowing users to create quick analysis in a form of insights with rapid and easy access to CEIC databases. We have introduced substantial improvements from performance to usability to capabilities over the previous web and desktop versions (WebCDM + CDM).

With the goal to improve user experiences with simple steps and clicks to complete a workflow, our proprietary platform conveys a new concept in data discovery, advanced visualization, data transformation, extraction, integration, management, collaboration and engagement.

2. STARTING CDMNEXT

2.1 Login

To access CDMNext, go to **https://insights.ceicdata.com** and log in with your registered email.
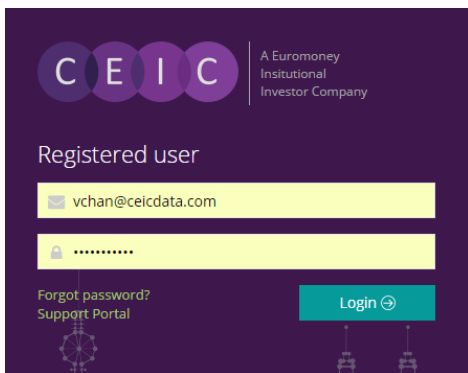
Forgot password?

Enter your registered email address to reset your password.

Support Portal

Login to CEIC Support Portal directly to access our comprehensive Knowledge Base covering solutions and FAQs on data related questions, platform issues and CDMNext functionalities.

Guest Mode

For IP authenticated users who prefer to navigate CDMNext without registration, a guest access is available for the same subscribed data with limited platform functionalities.

2.2   Prerequisites

CDMNext currently supports the following browsers and versions:

Browsers	Resolutions	Devices
Windows 7 and above 1) Internet Explorer 10+ 2) Google Chrome 31+ 3) Firefox 30+ 4) Safari (latest) 5) Opera (latest) 6) 360 **Mac OS X Mavericks** 1) Chrome (latest) 2) Firefox (latest) 3) Safari (latest) **iOS 8.0 and above** 1) Chrome (latest) 2) Firefox (latest) 3) Safari (latest) 4) Opera (latest) **Android 5.0 and above** 1) Chrome (latest) 2) Firefox (latest) 3) Opera (latest)	⬇ Desktop (with resolution 1920 x 1080 and up) ⬇ Laptop (with resolution 1366 x 768 and up) ⬇ Tablet (1024x768 - landscape orientation) ⬇ Tablet (768x1024 - portrait orientation)	⬇ Desktops, Laptops ⬇ iPad 3+

2.3   Landing Page

Upon logging on CDMNext, the landing page starts with intuitive search to help you analyze data series and visuals in a new insight.

The data discovery on the left panel allows users to easily navigate our CEIC databases, key series, comparables, release calendar and insights by simply typing any keyword combination. To create an insight, simply drag and drop the series and visuals to the right panel.

The series selection and visual creation are collapsed on the right panel.

The menu bar at the top of data discovery allows user to facilitate the insight settings and access help and support.

1. **File** – Open and save insights, and set insight permissions
2. **Alerts** – Set notifications on insight activities
3. **Insights** – Navigate Insight Explorer to access available insights
4. **Products** – Explore CEIC databases including premium suite
5. **Footnotes** – Access the latest information on methodology and data specifics
6. **Help** – Access useful information about CDMNext and contact our Helpdesk team

3.   CREATING INSIGHTS

To manage your insight on the system landing page (**New Insight**), click on the FILE tab with the following dropdown options:
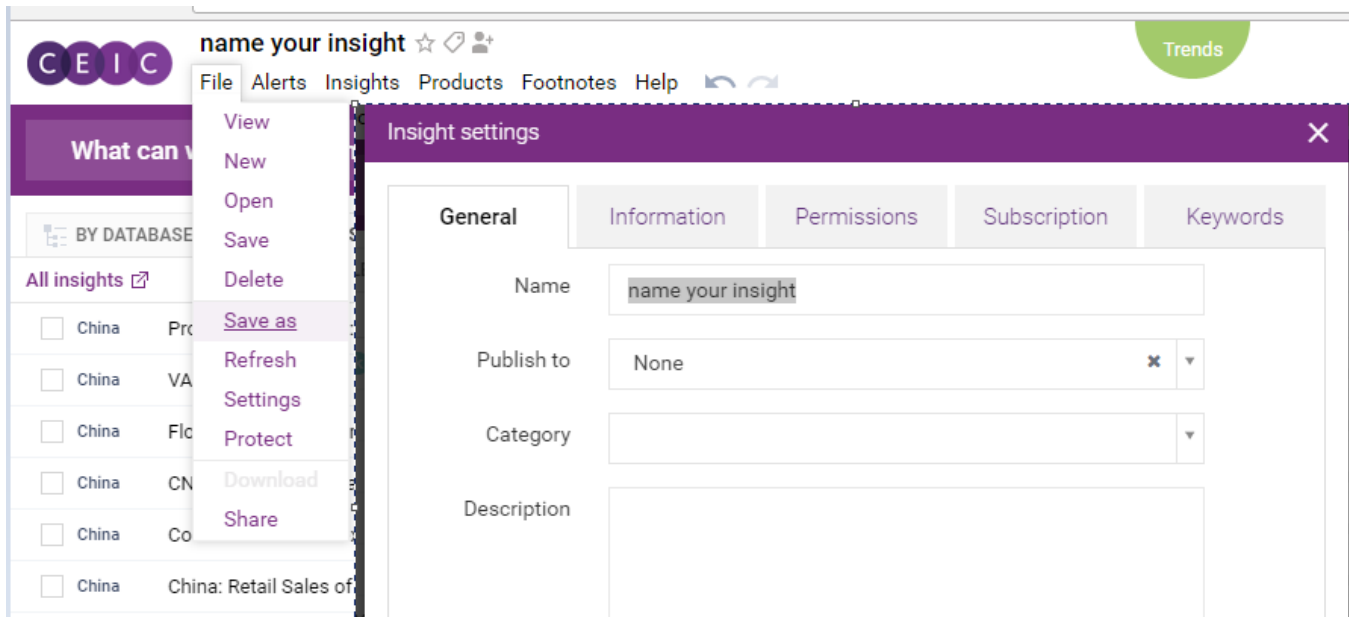
- To create a new insight
- To open your existing insights
- To save / delete your current insight
- To copy and save as a new insight
- To refresh / update in your insight
- To manage your insight settings (below screenshot)
- To download your insight
- To share your insight with other CDMNext users

Alternatively, if you are on the landing page of **Insights Explorer**, you may search and navigate all the available insights that are previously created / saved by yourself and shared by others. The search for insight will run through all the following criteria(s) to help you locate your desired insight(s):

 a) Name
 b) Creator
 c) Description
 d) Category
 e) Tags
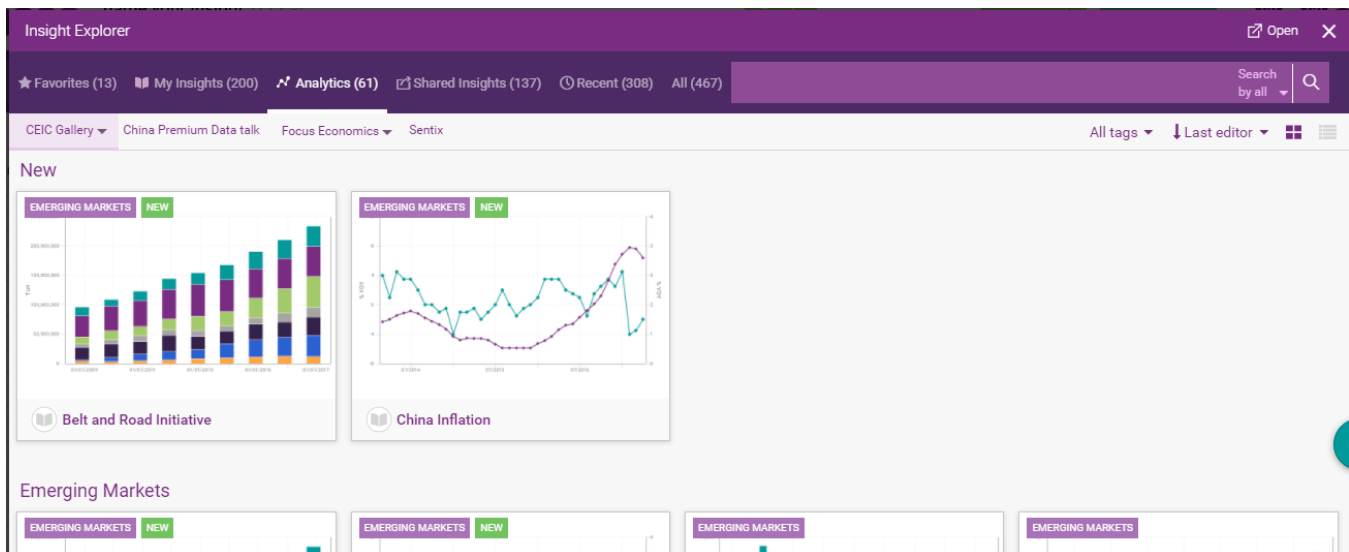
3.1 Data Discovery

CDMNext provides search customization including sorting options, result display and live search. Go to 'Preference' under the drop down menu located in the upper right hand corner to customize your search preference.

In the search bar, you may type in any keyword combination to run through the application to locate the desired data series and insights. API and R subscribers can retrieve the search results in those platforms, by selecting to perform the search as an R code or API call.
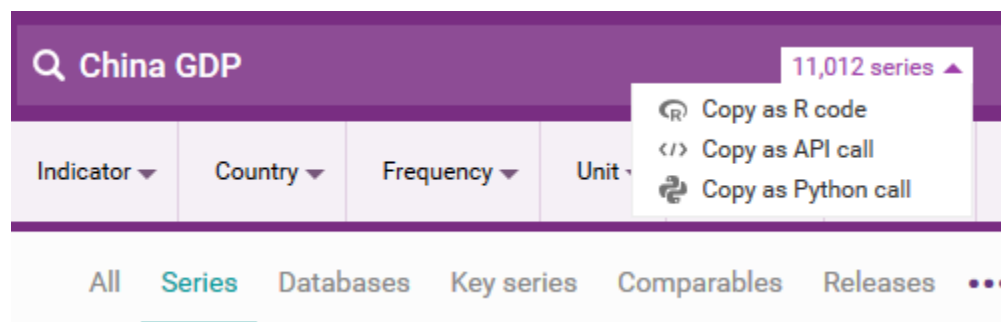
By default, the **FILTERS** are hidden to save space on the interface. Click on the downward arrow of filters to expand the available series attributes to filter your selection. The multi-dimensional filters include the economic **indicators** in first and second levels (defined by CEIC database structure), **region/country, frequency, unit, source, status** and **observation date**.

- To pin your favorite filter to the left in your search (in this example, economic indicators is selected), you can simply drag and drop the selected filter.

- Additional options in **advanced search** allows users to include/exclude any keyword combination and series IDs. The search for series ID can filter out non-series ID inputs such as keywords / operators. **Help** offers search tips.

The faceted search algorithm helps to refine and filter results by selecting one or more criteria in parent-child relationship. Within a rich database, this hierarchy structure enhances the flexibility to retrieve data in a systematic approach by excluding unmatched results.

For example, if you select 'active' under status, other filters will only include 'active' series with narrowed down results.

Under **by series**, the sort by field with dropdown options allows users to arrange the results in preferred order.

- Popularity – by series with highest usage
- New series – by newest series last added in the databases
- Recently updated – by latest series with modified time point/status

As you start typing, CDMNext search provides keyword autocomplete in **keyword predictions** which is managed by stemming, search suggestion, acronyms/synonyms.

In the search drop down, **CEIC suggestion** is also made available with relevant series attributes to facilitate facet predictions to speed up the search processing and enriching results.

At the bottom of the search panel, you may select the number of results to display per page.

Besides searching for series under databse (by database layout tree) and relevancy, users can also search under comparables, key series and by release calendar.

A single search screens out the results under all 5 data tabs as well as the insights explorer.

To access the **series info**, you may click on the green information icon next to the series check box or click on the series name.

Alternatively, you can right click to view series info and other options including view series in a quick **chart, table** or **map**, direct download, respective **footnotes**, or **copy** series as a link.

A **series info** consists of an overview, data, related series, related insights and help.
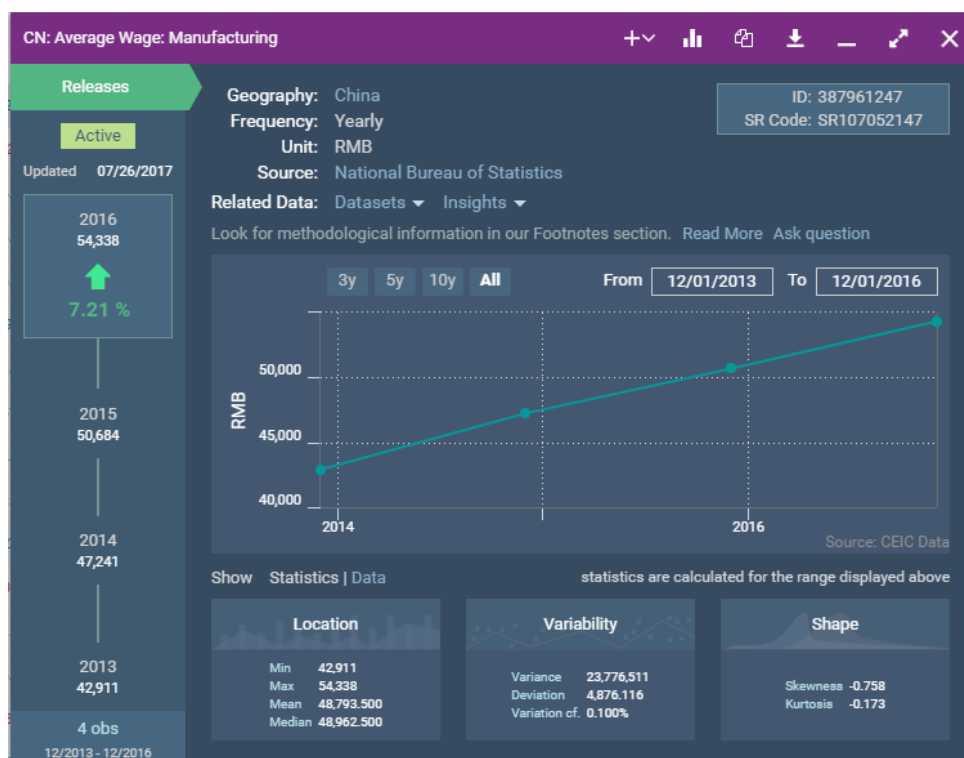
You can access the series remarks, corresponding footnote article and knowledge base in self-support. If you need further assistance, please submit your question to us. Our helpdesk team will review your questions as early as possible.
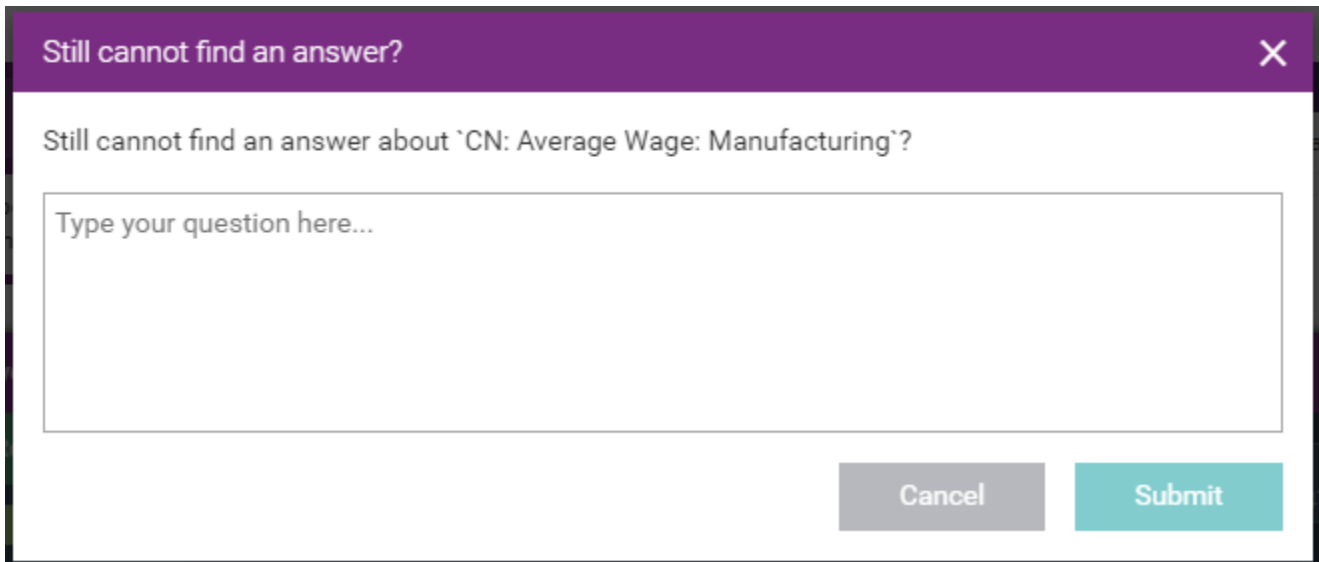
Under **by series** tab, users can right click on the selected series to show where the series belong to in the database tree or table level.

3.2   Data Selection

When you have identified the series to save in your insight, simply drag and drop the selected series from search to the series list or visual creation on the right panel. Alternatively, you may click on + to add series to the series list.

This action will be auto saved in your insight by default setting.

The arrows in between data discovery and selection allow you to adjust the space for each panel display. This allows you to collapse or expand for a shared / full screen display.

Within the data selection, you may view the data in a list or table format. Under the sort by options, you can arrange the series display order to your preference.

For better organization of the selected data, users may separate / group the data in the preferred sequence and category.
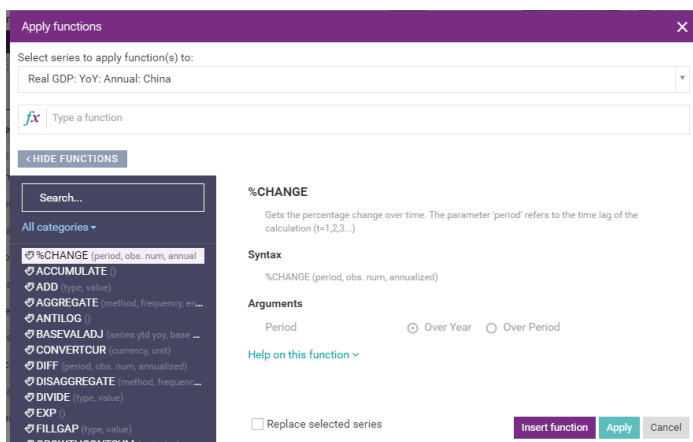
3.3   Data Transformation

To apply math functions to the selected series, you may type a function on the function bar or access function editor to see all available formulas.
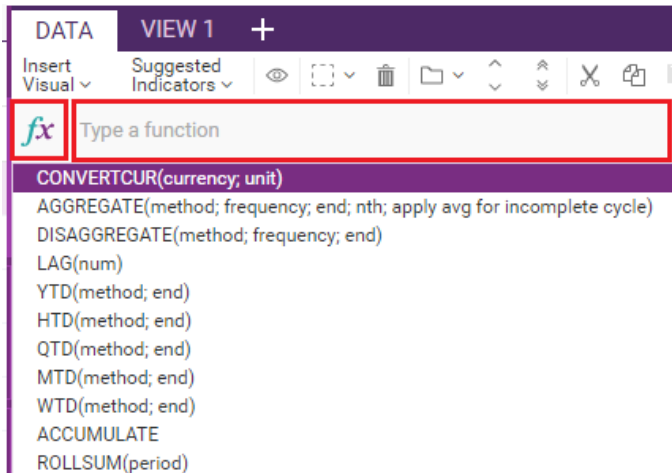
In the formula bar, you can type in a single function or a combination of functions.

Function suggestion is also available while searching.

To access the full view of function editor, simply click on *fx* 'all functions.'

The same formula bar is presented to allow searching and browsing.

Alternatively, you can insert a function from the list of categories on the left.

To see the respective function description and illustrated example, click on 'help on this function.'

For quick calculations, you may right click on the selected series for calculation on the fly.

3.4   Visualization

Next to the data tab, the **VIEW** tab is presented for visual creation. The available visual tools include chart (line, area, column, bar), table, map, text, attachment insert and image upload.

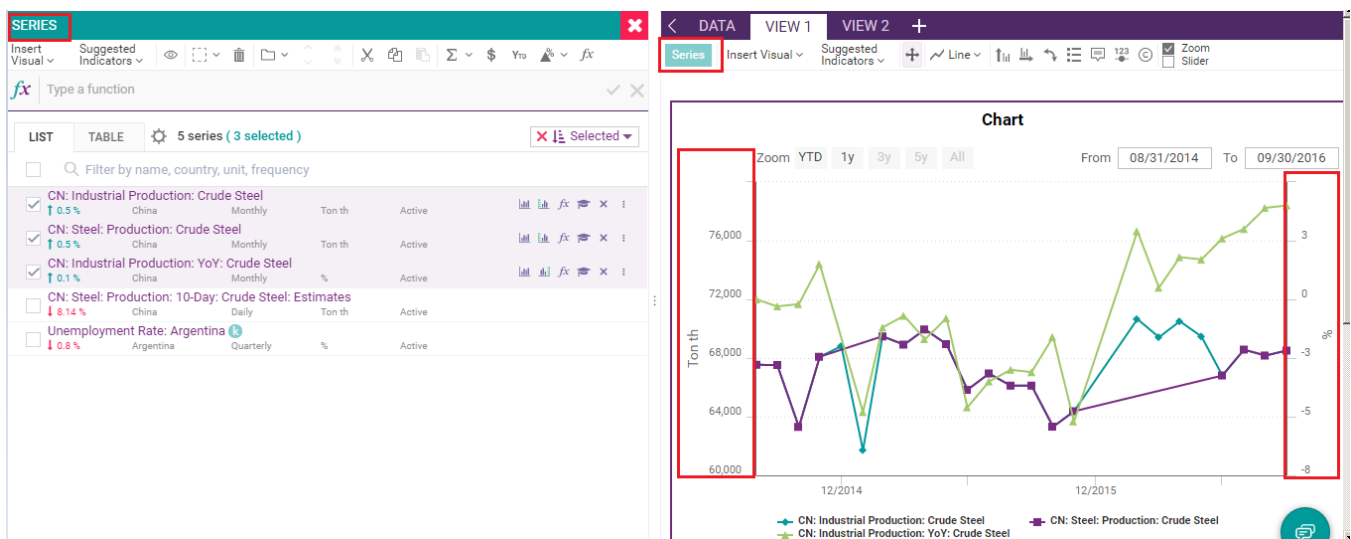You may create up to 10 views (tabs) within an individual insight.

To insert a visual with the selected series, you can simply drag and drop the selected series from search on the left panel to the right panel in the content area.

With more than one visual presented in the VIEW tab, you can drag and position each visual presented in the content area.

To modify the series settings of your selected visual, click on the **series** to open up the series settings on the left hand panel.

You can select the series to directly reflect in your visuals.

CDMNext offers an in-built auto axis detection to properly place series with 2 different units onto the left and right axis.

Other visual configurations such as date range, attributes, values, legend, and data labels are available. By clicking on the visual, the customization is available for further modification on the top.
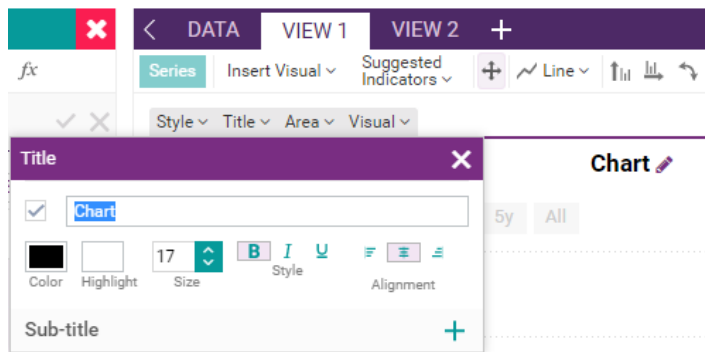
To direct edit the chart elements, double click on the title or click on the pencil icon.
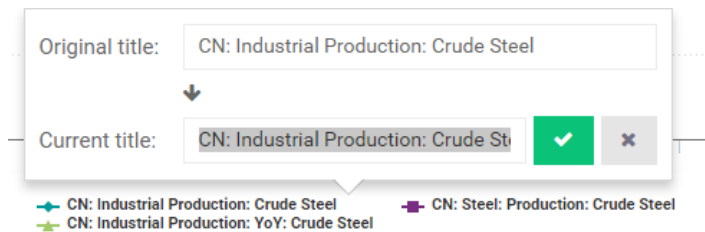
Under both the DATA and VIEW tabs, CDMNext offers **related indicators** based on the country currently displayed/selected in your data/visual.

The suggested indicators include the macro indicators from Global Economic Monitor, financial indicators from Daily Database, and global indicators from a mix of databases.

To select a country to see related indicator, click on the country dropdown.

By default, when no series is selected, related indicators suggest the following countries – China, United States, Japan, India, and United Kingdom.

3.5   Download

The download options include series only and all views tabs of an insight.

The selection of download **formats**, **timeframe**, **data placement** and **output series details** are available in the download options.


- **'Copy to Clipboard'** allows the copy of data/visuals to your existing Excel file.
  API and CEIC R Package subscribers can also use this functionality to generate a code or http request to export the selected series in those applications.
- **'Download'** allows the download of your selection to a new file.

To download only your selected visual, you may right click on download or click on the icon presented for download and copy to clipboard.
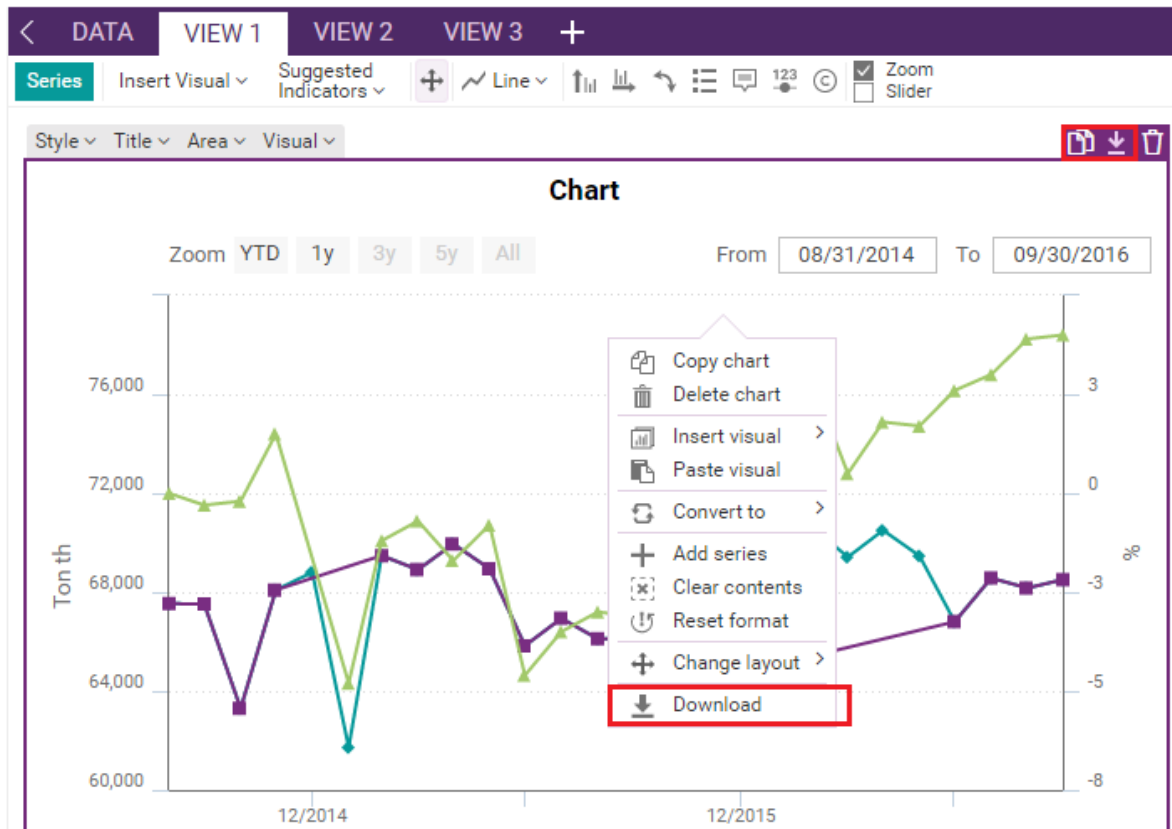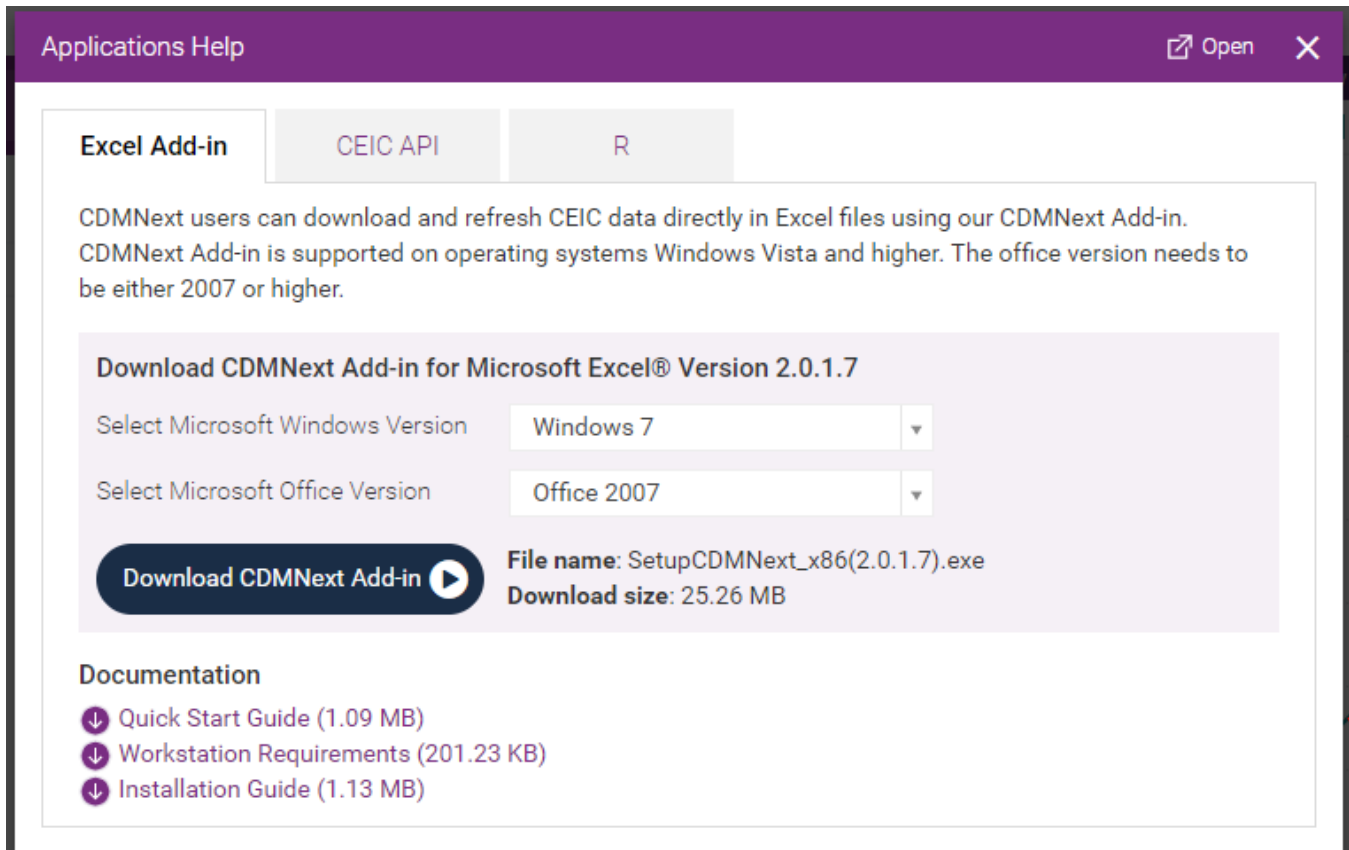
To refresh data in Microsoft Excel, please download our **CDMNext Excel Add-in** available under the upper right option in the drop down menu.

Alternatively, you can download the CDMNext Excel Add-in under the HELP tab.
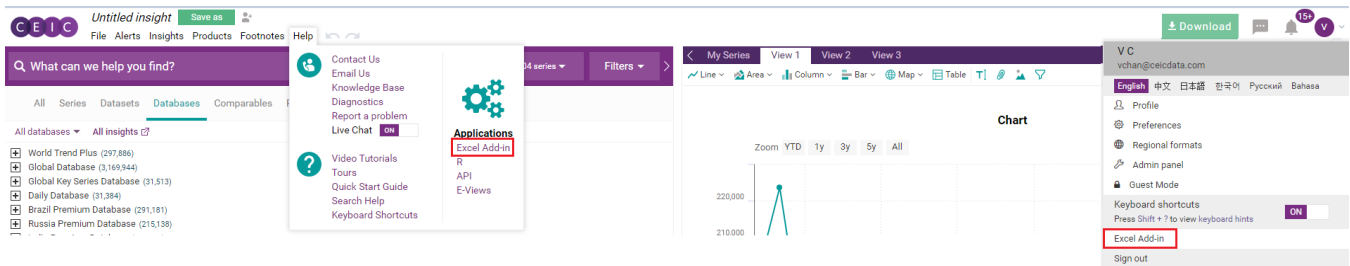
CDMNext Add-in is avaialble to download for CDMNext registered users.

Select your Microsoft Windows Version and Office Version to download our latest CDMNext Add-in version.

The workstation requirements, installation guide and quick start guide are available.

3.6   Alerts

To set data and insight alerts, click on the dropdown option under **ALERTS** tab.

It provides the ground rule of user comments and notifications to facilitate collaboration which can be viewed and managed below.
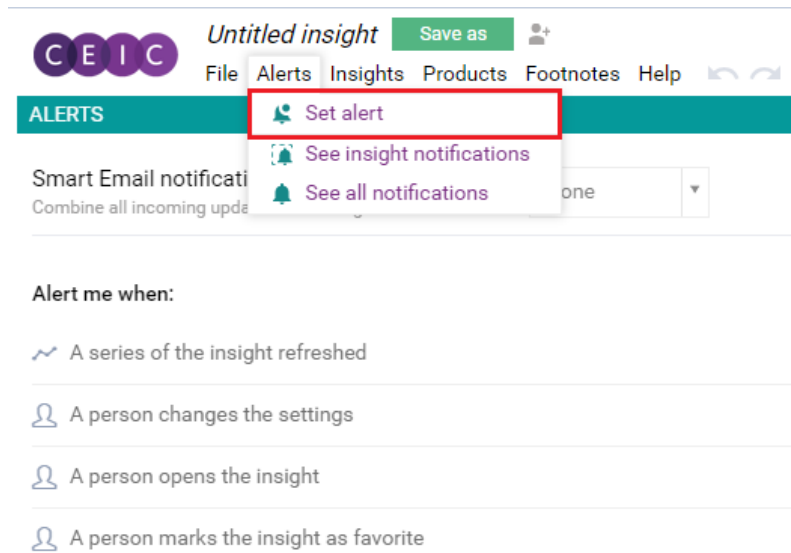
The alerts can be modified on the system level and/or via email notification.

Smart Email Notifications: Select a period to receive an email with aggregated notifications in a summary of alerts.

Data Update: By adding your favorite data series to an insight, you can turn on the notification for 'a series of the insight refreshed' for data monitoring. As soon as the data inside your insight has revised / updated its time point or series attributes in CDM, you will be notified instantly.
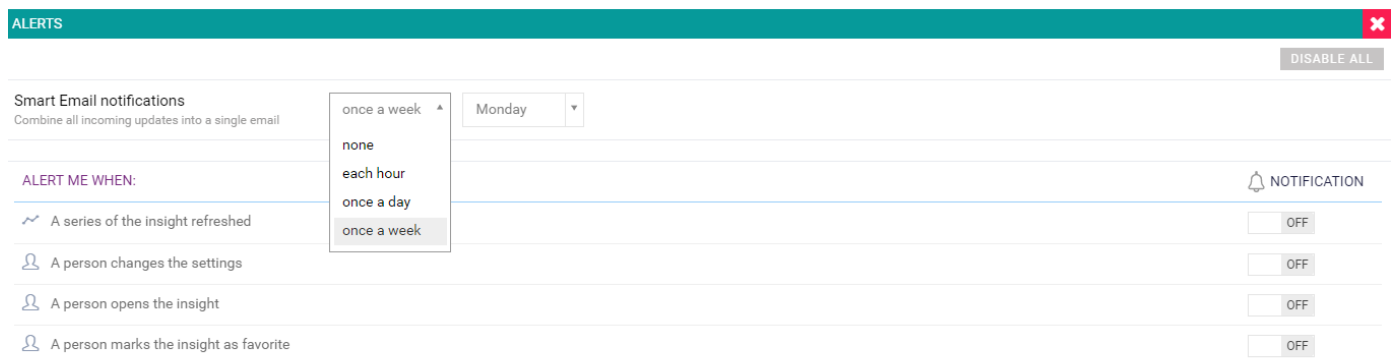
3.7　Share

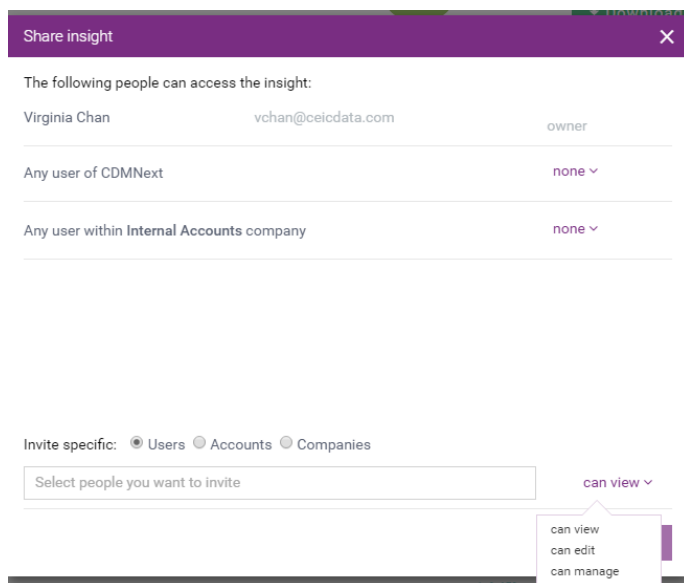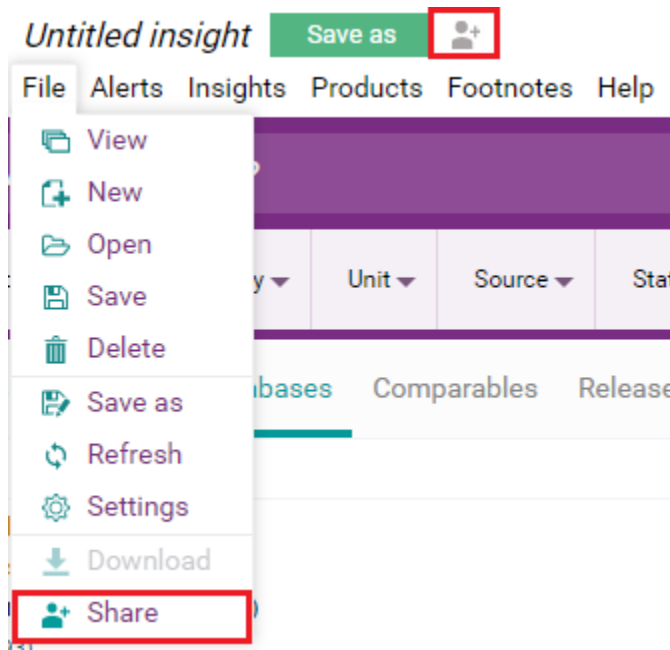After you have saved your insight, you may share it with other users within the same organization. Click on the **SHARE** button on the upper left menu or under File menu tab.

You may invite specific users to access your insight with option to view, edit or manage.

Can view – shared user(s) will be granted with permission to view the insight only

Can edit – shared user(s) will be granted with permission to modify the insight (such as adding series, creating a visual, uploading an attachment)

Can manage – shared user(s) will be granted with the same permission as the creator (such as sharing with others, deleting an insight)

4.   USER SETTING

4.1   General Setting

On the upper right hand corner, users can modify personal information, interface language (available in English, Simplified Chinese, Japanese, Korean, Russian, and Indonesian Bahasa), date & time and default settings.

The keyboard shortcuts are available when enabled.
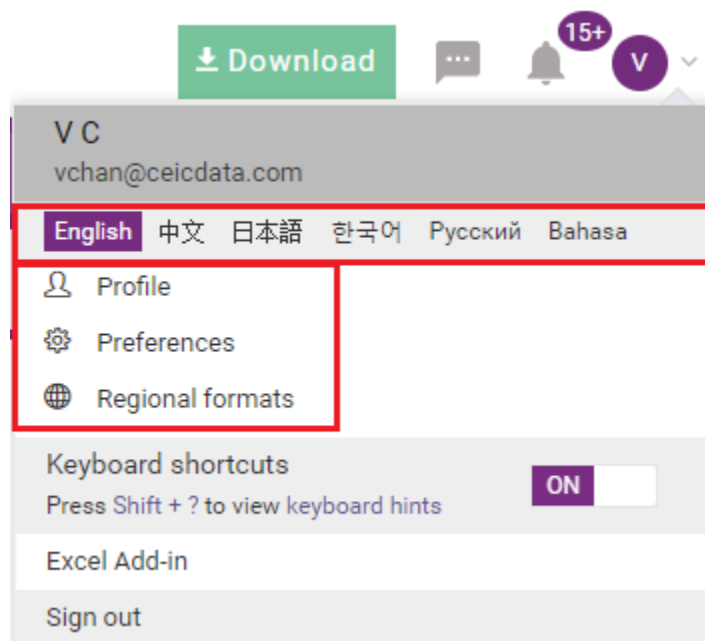
5.   WHAT'S NEW

For keep abreast on CEIC announcements, users can explore 'what's new' under Products in the menu tab.

This page features the monthly product newsletter, important events/webinars, user survey and other important announcements.

6. ABOUT CEIC AND OUR DATABASES

For more information about CEIC, visit our website:

http://www.ceicdata.com

For more information about our databases, visit our website:

http://www.ceicdata.com/en/products